

## SBA First Wednesday Seminar starts at 9:30 central time

### Test drive of Ready Talk:

- ◆ Call-in is 1-866-740-1260, access code 3076601.
- ◆ Log-in at [www.readytalk.com](http://www.readytalk.com), same code.
- ◆ Support: 800-843-9166. Have access code.
- ◆ Introduce yourselves prior to 9:30 if you want
- ◆ Do not minimize the screen. You will be shut out
- ◆ Put your phone on mute. “Raise your hand.” Unless your office is quiet.
- ◆ We email copies of the PowerPoint upon request.
- ◆ If listening in groups, email participant names and email addresses in Excel for 1102 credit – within a week of training.
- ◆ Questions: Ask at any time.



***“An investment in knowledge pays the best interest.”***

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**Programs & Services 3/1/2010**

# SBA District Offices ([www.sba.gov](http://www.sba.gov))

Iowa

Minnesota

North Dakota

St. Louis

Kansas City

Nebraska

Wichita

South Dakota

- ◆ Procurement Technical Assistance Centers

<http://www.dla.mil/db/procurem.htm>



# **“Small business marketing research and coordinating with SBA”**



**Programs & Services 3/1/2010**

# Think buying a new car



**Programs & Services 3/1/2010**

# You conduct market research – with gusto

- ❖ Brochures
- ❖ Visit dealerships
- ❖ Research specifications and learn about financing plans, discounts, warranties, options, etc. (Terms and Conditions)
- ❖ Attend car shows
- ❖ Ask friends, relatives, coworkers
- ❖ Read trade journals
- ❖ Search Internet
- ❖ Check Yellow pages



# **FAR 2.101**

## **Definition of market research:**

“Market research” means collecting and analyzing information about capabilities within the market to satisfy agency needs.



# Why Small Business

- ◆ Employ 51% of all private sector employees
- ◆ Generate 60% to 80% of net new jobs annually
- ◆ Create more than 50% of gross domestic product
- ◆ Leaders in innovative research and development
- ◆ Over 95% of businesses are small
- ◆ Major source of innovation
- ◆ All large were once small
- ◆ **Taxpayers**



# Why Small Business

It is the law:

FAR 19.201(a) “It is the policy of the Government to provide maximum practicable opportunities in its acquisitions to small business.....”



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# Challenges

- ◆ Staff turnover
- ◆ New staff
- ◆ Staff shortages
- ◆ Increased workload. (American Recovery and Reinvestment Act).
- ◆ But the FAR requirements for market research and small business are the same



# What we are going to cover

1. Small business: A “rule of two” world
2. Market research policy: It’s all in the FAR
3. Market research steps
4. What SBA expects to see
5. Whom to contact at SBA for what



# **1. Small business: A “rule of two” world**



# What is the rule of two?

FAR 19.502-2(b).

b) The contracting officer shall set aside any acquisition over \$100,000 for small business participation when there is a reasonable expectation that:

- (1) offers will be obtained from at least two responsible small business concerns....; and
- (2) award will be made at fair market prices.

**FAR 19.502-2 (a) reserves acquisitions of over \$3,000 and \$100,000 for small business.**



# Rule of two applies to:

- HUBZone
- SDVOSB
- Small business

Watch in use of competitiveness demonstration, FAR 19.10

Goal achievement has no bearing on the rule of two ✓



# Federal small business goals

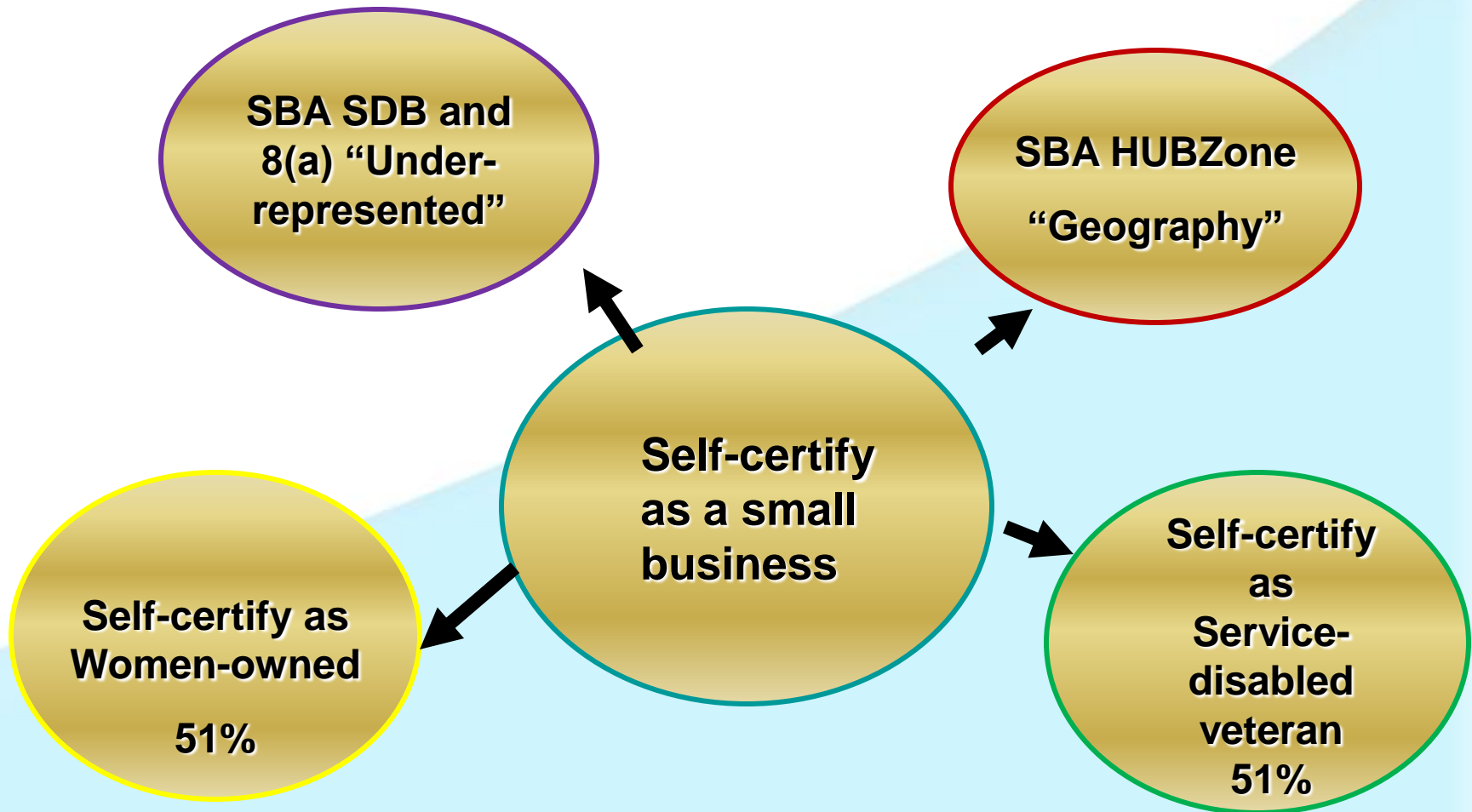
Small Business	23%
Small disadvantaged business	7%
Women-owned small businesses	5%
HUBZone program	3%
Service-disabled veterans	3%

SBA goaling website:

<http://www.sba.gov/aboutsba/sbaprograms/goals/index.html>



# Certifications

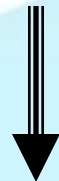


# Program parity: Set-asides determined by market research

8(a) ═══════ HUBZone ═══════ Service-Disabled Vet



**Small business**



**Unrestricted competition**

Over \$100,000

[www.justice.gov/olc/2009/sba-hubzone-opinion082109.pdf](http://www.justice.gov/olc/2009/sba-hubzone-opinion082109.pdf)



**Programs & Services 3/1/2010**

# How SBA fits

13 CFR 13 125.2 (b)

....PCRs are responsible for reviewing all acquisitions not set-aside for small businesses....

To determine whether a set-aside is appropriate and....

To identify alternative strategies to maximize the participation of small businesses in the procurement.



# How SBA fits

## **19.402 Small Business Administration procurement center representatives.**

(a)(1) The SBA may assign one or more procurement center representatives....

To any contracting activity or contract administration office....

To carry out SBA policies and programs.



# How SBA fits

## **19.402 Small Business Administration procurement center representatives.**

(2) If a SBA procurement center representative is not assigned to the procuring activity or contract administration office...See <http://www.sba.gov/GC/pcr.html>...

(b) Upon their request.... contracting officers shall give SBA procurement center representatives..... access to all reasonably obtainable contract information that is directly pertinent to their official duties.



# How SBA fits

19.505 Rejecting Small Business Administration recommendations.

- ◆ SBA may appeal a contracting officer's rejection of its recommendations



## **2. Market research policy: It's all in the FAR**



# 19.201

## General policy

(a) It is the policy.... to provide maximum practicable opportunities in its acquisitions to small business, veteran-owned small business, service-disabled veteran-owned small business, HUBZone small business, small disadvantaged business, and women-owned small business concerns.

Such concerns must also have the maximum practicable opportunity to participate as subcontractors....



# **FAR 19.202**

## **Small business program specific policies**

In order to further the policy in [19.201](#)(a) (maximum practicable opportunities), contracting officers -

Shall comply with the specific policies listed in this section and

Shall consider recommendations of the agency Director of Small and Disadvantaged Business Utilization, or the Director's designee, as to whether a particular acquisition should be awarded under [Subpart 19.5](#), [19.8](#), or [19.13](#).



# **FAR 7.102**

## **Acquisition planning policy**

- ◆ (a) Agencies shall perform acquisition planning and conduct market research (see Part 10) for all acquisitions...
- ◆ (b) This planning shall integrate the efforts of all personnel responsible for significant aspects of the acquisition. The purpose of this planning is to ensure that the Government meets its needs in the most effective, economical, and timely manner...



# **FAR 10.001**

## **Market research policy.**

(a) Agencies must—

- ❖ (1) Ensure that legitimate needs are identified and trade-offs evaluated to acquire items that meet those needs;



# **FAR 10.001**

## **Market research policy.**

(a)(2) Conduct market research appropriate to the circumstances—

- ❖ (i) Before developing new requirements documents for an acquisition by that agency;
- ❖ (ii) Before soliciting offers for acquisitions with an estimated value in excess of the simplified acquisition threshold;
- ❖ (iii) Before soliciting offers for acquisitions with an estimated value less than the simplified acquisition threshold when adequate information is not available and the circumstances justify its cost;



# **FAR 10.001**

## **Market research policy.**

- ❖ (a)(2)(v) Agencies shall conduct market research...

On an ongoing basis, and take advantage to the maximum extent practicable of commercially available market research methods,...

To identify effectively the capabilities, including the capabilities of small businesses and new entrants into Federal contracting,...

That are available in the marketplace for meeting the requirements of the agency....; and...



# **FAR 10.001**

## **Market research policy.**

(a) (3) Use the results of market research to—

- ❖ (i) Determine if sources capable of satisfying the agency's requirements exist;.....
- ❖ (vii) Determine whether bundling is necessary and justified (See FAR 7.107)

(b) When conducting market research, agencies should not request potential sources to submit more than the minimum information necessary.



# **FAR 10.001**

## **Market research policy.**

- (c) If an agency contemplates awarding a bundled contract, the agency—
- (1) When performing market research, should consult with the local Small Business Administration procurement center representative (PCR)...; and
  - (2) At least 30 days before release of the solicitation or 30 days prior to placing an order without a solicitation—
    - ❖ (i) Must notify any affected incumbent small business concerns of the Government's intention to bundle the requirement; and
    - ❖ (ii) Should notify any affected incumbent small business concerns of how the concerns may contact the appropriate Small Business Administration representative.



# Researching other sources

## FAR 8.002

- ❖ Federal Prison Industries
- ❖ Javits-Wagner-O'Day Act
- ❖ GSA Federal Supply Schedules. (See GSA Acquisition Letter V5-12 and extensions.)



### **3. Market research steps**



# Think small business first

- ◆ Use market research to craft a strategy, not to validate a pre-existing strategy
- ◆ Work with a mindset to show small business cannot perform. (A small business pre-disposition, a process of elimination.)
- ◆ Make the research “small business friendly”



# Think small business first (cont.)

- ◆ Educate customers on small business requirements
- ◆ It only takes two



# **FAR 10.002**

## **Market research procedures**

- (a) Acquisitions begin with a description of the Government's needs stated in terms sufficient to allow conduct of market research.
- (b) Market research is then conducted to determine if commercial items or nondevelopmental items are available to meet the Government's needs or could be modified to meet the Government's needs.
  - ❖ (1) The extent of market research will vary, depending on such factors as urgency, estimated dollar value, complexity, and past experience....



# **FAR 10.002**

## **Market research procedures**

- (2) Techniques for conducting market research may include any or all of the following:

- (i) Contacting knowledgeable individuals in Government and industry regarding market capabilities to meet requirements.

- (ii) Reviewing the results of recent market research undertaken to meet similar or identical requirements.



# **FAR 10.002**

## **Market research procedures**

- (iii) Publishing formal requests for information in appropriate technical or scientific journals or business publications.
- (iv) Querying the Government wide database of contracts and other procurement instruments intended for use by multiple agencies available at [www.contractdirectory.gov](http://www.contractdirectory.gov) and other Government and commercial databases that provide information relevant to agency acquisitions.
- (v) Participating in interactive, on-line communication among industry, acquisition personnel, and customers.



# **FAR 10.002**

## **Market research procedures**

(vi) Obtaining source lists of similar items from other contracting activities or agencies, trade associations or other sources.

(vii) Reviewing catalogs and other generally available product literature published by manufacturers, distributors, and dealers or available on-line.

(viii) Conducting interchange meetings or holding presolicitation conferences to involve potential offerors early in the acquisition process.



# **FAR 10.002**

## **Market research procedures**

- (2) (e) Agencies should document the results of market research in a manner appropriate to the size and complexity of the acquisition.



# Could we have just a bit of – gusto?



**Programs & Services 3/1/2010**

# **Question 1: What did you do last time? (History.)**

- ◆ Repeat of a prior buy
- ◆ Justification is on file for the strategy last time
- ◆ Apply or update for this buy

## **Question 2: Is there existing market research elsewhere in your agency?**

- ◆ Check how it is done elsewhere
- ◆ See what other offices have done
- ◆ Ask others about their experience

## Question 3: Is there existing market research outside of your agency?

- ◆ See what other agencies have done at [www.fbo.gov](http://www.fbo.gov)
- ◆ Talk to other agencies

## Question 4: Have you done a sources sought?

- ◆ Give sufficient time for response
- ◆ Make it small business friendly
- ◆ Ask for enough information
- ◆ Ask early
- ◆ Ask routinely in support of a forecast

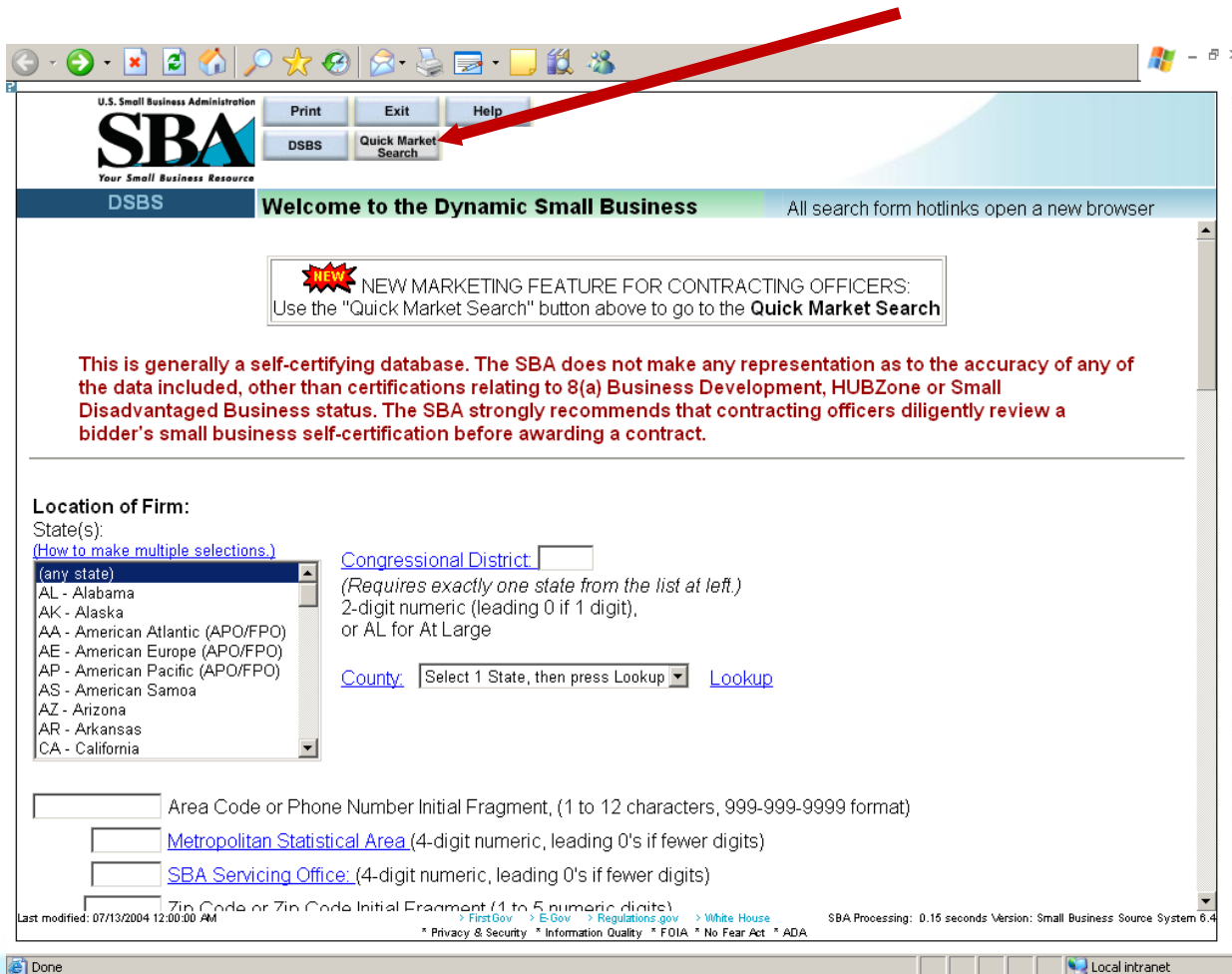
# Question 5: CCR Dynamic Small Business Search

- ◆ Know the system
- ◆ Justify the area you search
- ◆ Use codes and/or key words
- ◆ Call to see if the small business has the capacity
- ◆ Call to see if the small business will participate



# **CCR dynamic small business search - quick market research**





[http://dsbs.sba.gov/dsbs/search/dsp\\_dsbs.cfm](http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm)



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U.S. Small Business Administration  
**SBA**  
Your Small Business Resource

Print Exit Help  
DSBS Quick Market Search

**Quick Market Search** Welcome to Quick Market Search All search form hotlinks open a new browser window.

Based on the search criteria selected, the Quick Market Search will return an aggregate number of profiles in the following socio-economic categories: HUBZone, 8(a), Small Disadvantaged Business (SDB), Woman-owned, Veteran owned and Service Disabled Veteran-owned in a randomized order. It is also possible to drill down to the specific profiles identified in the search results. (Note: To find small businesses NOT in these socio-economic categories, go to DSBS using the button above.)

**Nature of Business (comma separated, up to 5 entries or 40 characters) for:**

NAICS Code(s): ☒ Any ☐ All (slower) 238220 [Help](#)

Or keywords (comma separated, up to 25 entries or 125 characters) for:

[Keywords:](#) ☒ Any ☐ All (slower) [Help](#)

**Location of Firm.**

State(s):  
[\(How to make multiple selections.\)](#)

(any state)  
AL - Alabama  
AK - Alaska  
AA - American Atlantic (APO/FPO)  
AE - American Europe (APO/FPO)  
AP - American Pacific (APO/FPO)  
AS - American Samoa  
AZ - Arizona  
AR - Arkansas  
CA - California

[Metropolitan Statistical Area](#) (4-digit numeric, leading 0's if fewer digits)

Zip Code or Zip Code Initial Fragment (1 to 5 numeric digits)

Last modified: 02/27/2007 12:00:00 AM

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Local intranet



U.S. Small Business Administration  
**SBA**  
 Your Small Business Resource

Print Exit Help  
 DSBS Quick Market Search

**SBA Search Results** **SBA Quick Market Search Results**

## SBA Quick Market Search Results

Quick Market Search Listing, where  
 the firm has not opted out of DSBS searches;  
 the firm is small in any of these NAICS codes: 238220;  
 the profile location is in: 'IA';  
 and economic groups randomized by original start time of search: 2009-02-25 05:37:09 PM.

Data validation took 0.02 seconds. The search took 0.00 seconds for certifications and 0.00 seconds for non-certifications.

Click on either hotlink in a row to list the firms in the economic group meeting your search criteria.

Economic Group	Number of Firms Found
<a href="#">Currently HUBZone Certified</a>	4
<a href="#">Woman or Women Owned</a>	9
<a href="#">Service-Disabled Veteran</a>	3
<a href="#">Veteran</a>	7
<a href="#">Currently 8(a) Certified</a>	1
<a href="#">Currently SDB Certified</a>	1

Last modified: 09/14/2007 12:00:00 AM

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[Regulations.gov](#)
[White House](#)
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Done Local intranet



Organization, Ownership & Certifications

Legal Structure: Corporation  
Ownership and Self-Certifications: Woman Owned

**Current Principals:** (Name, Title)  
Kathleen Sanderson, President  
Kirk Sanderson, Vice President

**"Business Development Servicing Office"**  
(for certifications):  
ALASKA DISTRICT OFFICE (SBA office code 1084)

**8(a) Certification:**  
SBA 8(a) Case Number:  
SBA 8(a) Entrance Date:  
SBA 8(a) Exit Date:

**Small Disadvantaged Business Certification:**  
SDB Entrance Date:  
SDB Exit Date:

**HUBZone Certification:**  
HUBZone Certified?: ☒ Yes ☐ No  
HUBZone Certification Date: 05/08/2008

**8(a) Joint Venture Certification:**  
8(a) JV Entrance Date:  
8(a) JV Exit Date:

Done Local intranet

Dynamic small business search in CCR



## **Question 5: CCR Dynamic Small Business Search, cont.**

- ◆ Do a sources sought using Small Dynamic Business Search
- ◆ Write sources sought
- ◆ Search Small Dynamic Business Search and gather email addresses
- ◆ Past your sources sought into email message
- ◆ Cut and paste emails into BCC



## SBA Search Results

### Table Listing, where

the firm is active in searches;  
 the firm is small in any of these NAICS codes: 236210;  
 the profile location is in: 'IA';  
 the firm is currently HUBZone-certified;  
 and randomized by original start time of search: 2009-12-04 04:31:09 PM.

Data validation took 0.01 seconds. The count and search queries took 1.67 seconds and 1.72 seconds, respectively.

Displaying profiles 1 - 6 (of 6 profiles matching criteria):

View	Name and Trade Name of Firm	Contact	Address and City, State Zip	Capabilities Narrative
1	<a href="#">MAXFOUR ENGINEERS AND ARCHITECTS, LLC</a> MAXFOUR	KIM MALEK	400 LOCUST ST STE 300 DES MOINES, IA 50309-2353	
2	<a href="#">IMPERIAL ROOF SYSTEMS CO.</a> ROOF MANAGEMENT MAINTENANCE &	LAURIE BURKHART	203 ARMOUR ST WEST UNION, IA 52175-1515	Over 30 yrs of Award Winning services in Roofing and General Construction. Certified HUBZone. Operates nation-wide. BIA National roofing MACC. Excellent bonding capabilities. Strong safety record. Wide private and government customer base.
3	<a href="#">KEOKUK CONTRACTORS, INC.</a>	DANNY ROSE	853 JOHNSON STREET RD KEOKUK, IA 52632-2213	
4	<a href="#">FRANK MILLARD &amp; CO. INC.</a> HANNUMS PLUMBING & HEATING	MAC ARTHUR COFFIN II	107 VALLEY ST BURLINGTON, IA 52601-5510	
5	<a href="#">R &amp; L REICKS ENTERPRISES, L.C.</a>	RODNEY REICKS	1936 MISSION AVE NEW HAMPTON, IA 50659-9350	Manufacture Hundreds of displays, furniture and cabinets per month.

Last modified: 09/10/2009 12:00:00 AM

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U.S. Small Business Administration  
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Print Exit Help  
 DSBS Quick Market Search

**SBA Search Results**

4	<a href="#">FRANK MILLARD &amp; CO. INC.</a> HANNUMS PLUMBING & HEATING	MAC ARTHUR COFFIN II	107 VALLEY ST BURLINGTON, IA 52601-5510	
5	<a href="#">R &amp; L REICKS ENTERPRISES, L.C.</a>	RODNEY REICKS	1936 MISSION AVE NEW HAMPTON, IA 50659-9350	Manufactures Hundreds of displays, furniture and cabinets per month.
6	<a href="#">JOHN W SAMMONS CONSTRUCTION CO. INC</a>	JOHN W SAMMONS	614 S 4TH ST KEOKUK, IA 52632-5724	General contractor, excavation, grading, water and sewers, highway, paving, utilities, carpentry, demolition, design, construction management, building construction, remodeling

No more matches [Refine Search](#)

[Save E-mail Addresses for All](#)

delimited by:

- ☒ semi-colon and space (Windows Outlook)
- ☐ comma and space (Macintosh Outlook, other e-mailers)
- ☐ new line (Excel/database, vertical, best for mail-merge data source)
- ☐ tab (Excel/database, horizontal, but changed to spaces by Netscape 4)

Please notify CCR if you discover any inaccurate contact information (address, e-mail address, fax or phone number) in the way most convenient for you.

CCR Customer Service Contact Information  
 Toll-Free Phone Number 1-888-227-2423  
 Outside U.S.: 1-269-961-4725  
 CCR: <http://www.ccr.gov>

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/dsbs/search/dsp\_profilelist.cfm?RequestTimeout=180 Local intranet 100%



# Cut and paste emails into BCC of outlook with your sources sought as the body of the email

**SBA**  
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DSBS Quick Market Search

SBA Search Results SBA Search Results - E-mail

## SBA Search Results - E-mail

**CAUTION:** The following feature is intended for those who wish to send electronic solicitations. Do NOT use this feature to advertise your products and services to Small Business Administration registrants. Any misuse of this feature for mass e-mailing (the practice of sending unsolicited commercial advertising, commonly referred to as "**spamming**") is not permitted. All complaints of "**spamming**" which are received by the SBA will be referred to the Office of the Inspector General for review and investigation.

Thank you for your cooperation.

### E-mail Address Listing, where

- the firm is active in searches;
- the firm is small in any of these NAICS codes: 236210;
- the profile location is in: 'IA';
- the firm is currently HUBZone-certified;
- and the profile has an e-mail address.

The e-mail query took 1.68 seconds.

Due to the 4K limit in the size of a "mailto" URL in Microsoft Internet Explorer 6, we are no longer generating a mail message containing the e-mail addresses. Instead, copy and paste the following into your e-mail client (outgoing mail message recipient list or personal distribution list), spreadsheet or database:

dannyrose@keokukcontractors.com; kim@maxfour.com; ksammons2009@msn.com; lbimperial@hotmail.com; mac@frankmillard.com; rreicks@iowatelecom.net

Last modified: 09/10/2009 12:00:00 AM

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[Privacy & Security](#) [Information Quality](#) [FOIA](#) [No Fear Act](#) [ADA](#)

Local intranet 100%



# Question 6: Have you researched GSA Federal Supply Schedule?

## 8.405-5 Small business.

- ◆ (a) Although the mandatory preference programs of Part 19 do not apply, orders placed against schedule contracts may be credited toward the ordering activity's small business goals....
- ◆ (b) Ordering activities may consider socio-economic status when identifying contractor(s) for consideration or competition for award of an order or BPA. At a minimum, ordering activities should consider, if available, at least one small business, veteran-owned small business, service disabled veteran-owned small business, HUBZone small business, women-owned small business, or small disadvantaged business schedule contractor(s)....



## Question 6: Have you researched GSA Federal Supply Schedule? (cont.)

8.405-5 Small business.

- ◆ (c) For orders exceeding the micro-purchase threshold, ordering activities should give preference to the items of small business concerns when two or more items at the same delivered price will satisfy the requirement.

(How to do this: See GSA Acquisition Letter V05-12, extended through 2010.)



## **Question 6: Have you researched GSA Federal Supply Schedule? (cont.)**

- ◆ Research the schedule by small business type.
- ◆ Use an evaluation factor for small business or type of small business – when there are factors other than price.
- ◆ Document the research and state whether or not you are using this reserve.
- ◆ Under \$100K, send RFQs to small business only



# **Question 7: Are you in touch with the small business community?**

- ◆ Welcome small businesses
- ◆ Keep information on file
- ◆ Hold meetings for special acquisitions
- ◆ Attend trade shows and outreach events



# Question 8: Is there documentation?

- You are on the record in the contract file
- Documentation for current decisions and future decisions
- FAR 10 requirement
- Justifies strategy
- Understandable and tidy
- Documentation to stand up to outside scrutiny



# Other points

- ◆ Start early
- ◆ Involve users

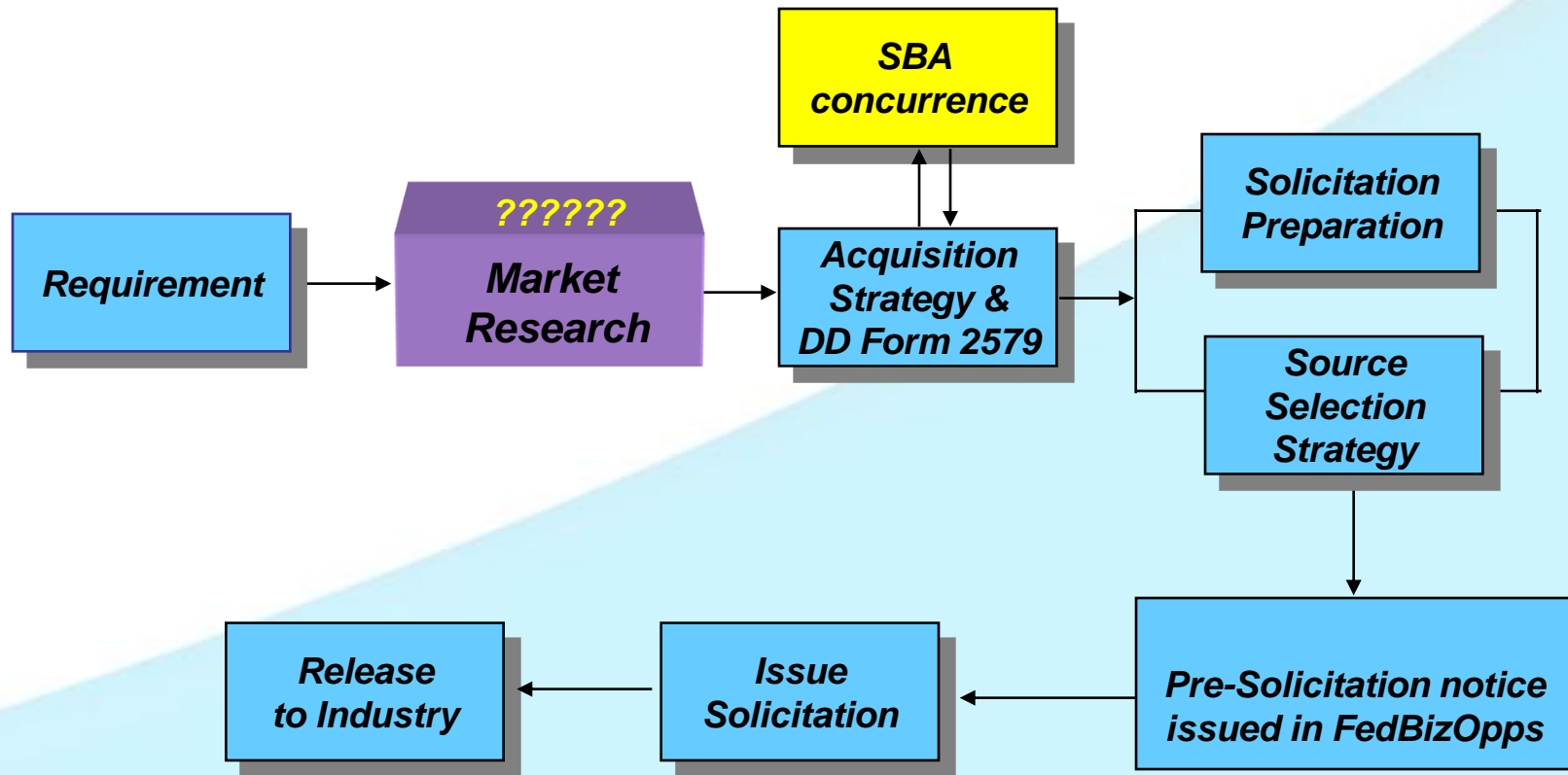


## 4. What SBA expects to see



**Programs & Services 3/1/2010**

# Acquisition sequence



# Looking for concurrence of the SBA

- ◆ Strategy is not tied to goal achievement
- ◆ Focus is on rule of two
- ◆ SBA has to understand what you are doing



# Looking for concurrence of the SBA

- ◆ SBA is not on your clock
- ◆ There are advantages to having SBA in your corner



# Well prepared forms

- ◆ All information attached as necessary
- ◆ Form is totally filled out
- ◆ For task orders too
- ◆ Stand-alone explanation for an outsider
- ◆ No guess-work



# Well prepared forms (cont.)

- ◆ Completed and error-free
- ◆ Easy to understand and “sell” what you want to do
- ◆ Emailed to SBA with SBA signing last before project moves forward
- ◆ Monitored for SBA response
- ◆ Do not proceed without SBA concurrence
- ◆ If the strategy changes, send a revised form to SBA with explanation



# Well prepared forms (cont.)

The facts

No editorializing:

*“8(a) costs too much.”*

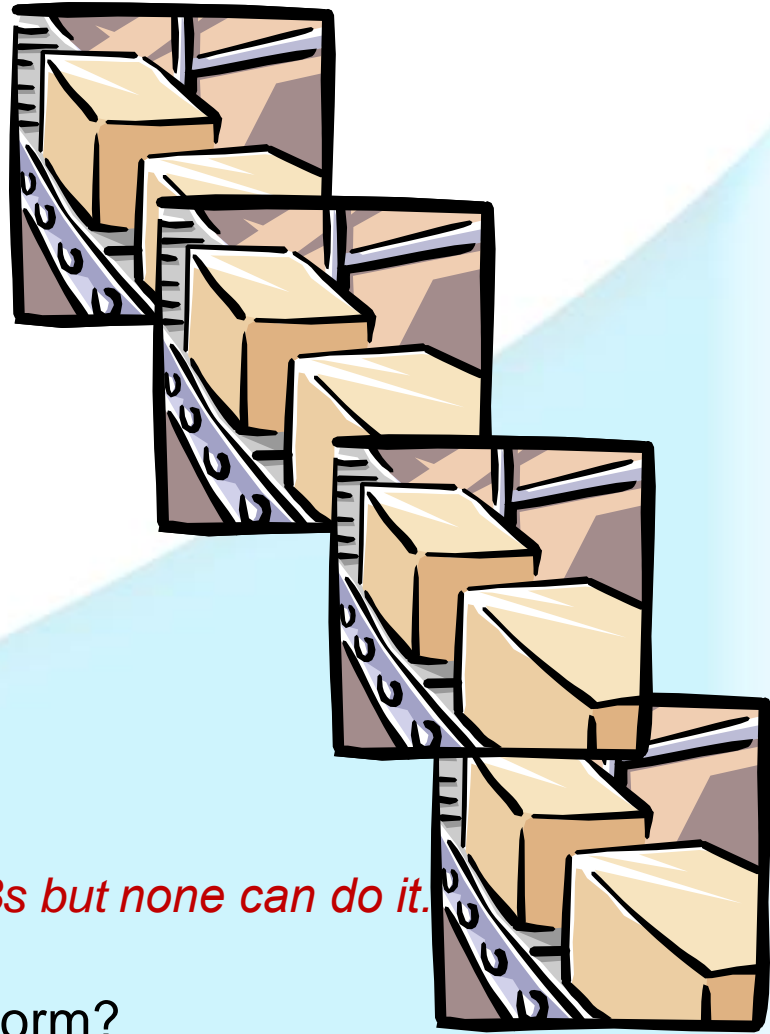
*“The locale is too far.”*

*“We do not want small business to lose money.”*

*“There are 20 8(a)s and 20 HZs, and 10 SDVOSBs but none can do it.”*

Can small business perform or can it not perform?

The best: Narrative



<b>Agency</b>	<b>Form</b>	<b>Title</b>
Commerce	CD 570	Small business set-aside review
Defense	2579	Small business coordination record
Energy	F 4200.40	Individual procurement action
GSA	2689	Procurement not set-aside
HHS	653	Small business review form
Homeland Security	700-22	Small business review form
Interior	1886	Acquisition screening and review form
NASA	D-WK 441-5	Small business review sheet
Transportation	4250	Small Business Program Review Form
USDA	AD-1205	Small Business Program – Procurement Request Review
VA	2268	Record of Procurement Request Review for Small Business Programs and Contract Bundling



# Well prepared forms

- ◆ Includes forms covering task orders
- ◆ Completed and error-free
- ◆ Easy to understand and “sell” what you want to do
- ◆ All information attached as necessary
- ◆ Form is totally filled out



## Well prepared forms (cont.)

- ◆ Stand-alone explanation for an outsider
- ◆ No guess-work
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- ◆ Do not proceed without SBA concurrence
- ◆ If the strategy changes, send a revised form to SBA with explanation



# SOLICITATION NUMBER AND/OR NAME OF ACQUISITION

<b>b. OFFICE SYMBOL</b>	<b>c. TELEPHONE (Include Area Code)</b>

<b>7. TYPE OF COORDINATION (X One)</b>		<b>8. SMALL BUSINESS SET-ASIDE</b>	
<input type="checkbox"/> INITIAL CONTACT <input type="checkbox"/> MODIFICATION <input type="checkbox"/> WITHDRAWAL		a. NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS) CODE b. NO. OF EMPLOYEES c. DOLLARS	
<b>9. RECOMMENDATION (X as applicable)</b>		<b>10. ACQUISITION HISTORY (X one)</b>	
YES <input type="checkbox"/> NO <input type="checkbox"/> (If all recommendations are "No" explain in remarks)		a. FIRST TIME BUY b. PREVIOUS ACQUISITION (X all that apply)	
a. SECTION 8(a) (X one) (1) COMPETITIVE (2) SOLE SOURCE		(1) SECTION 8(a) (2) SDB SET-ASIDE (3) HBCU/MI SET-ASIDE (4) SB SET-ASIDE (5) OTHER (Specify)	
b. SMALL DISADVANTAGED BUSINESS (SDB) SET-ASIDE c. HISTORICALLY BLACK COLLEGES AND UNIVERSITIES / MINORITY INSTITUTIONS (HBCU/MI) SET-ASIDE d. SMALL BUSINESS (SB) SET-ASIDE (List percentage) e. EMERGING SMALL BUSINESS SET-ASIDE f. EVALUATION PREFERENCE FOR SDBs g. HUBZONE SET-ASIDE h. HUBZONE SOLE SOURCE i. HUBZONE PRICE EVALUATION PREFERENCE		(6) TWO OR MORE RESPONSIVE SB OFFERS ON PRIOR ACQUISITION (7) ONE OR MORE RESPONSIVE SDB OFFER(S) WITHIN 10% OF AWARD PRICE OF PRIOR ACQUISITION (8) WOMAN OWNED SB (9) SERVICE-DISABLED VETERAN SB	
<b>11. SB PROGRESS PAYMENTS SUBCONTRACTING PLAN</b>			
(X one) YES <input type="checkbox"/> NO <input type="checkbox"/> REQUIRED (X one) YES <input type="checkbox"/> NO <input type="checkbox"/>			
<b>14. REMARKS</b>			
<b>15. REVIEWED BY SMALL BUSINESS ADMINISTRATION (SBA) LOCAL USE REPRESENTATIVE</b>			
a. NAME (Last, First, Middle Initial)		c. DATE SIGNED (YYYYMMDD)	
b. SIGNATURE			
<b>17. CONTRACTING OFFICER (X one)</b>		<b>18. SMALL BUSINESS SPECIALIST (X one)</b>	
<input type="checkbox"/> CONCURS <input type="checkbox"/> REJECTS		<input type="checkbox"/> CONCURS <input type="checkbox"/> APPEALS	
a. RECOMMENDATIONS (Document rejections on reverse side)		NOTE: Any change in the acquisition plan this coordination record describes will require return for the re-evaluation by the SB specialist.	
b. NAME (Last, First, Middle Initial)		a. NAME (Last, First, Middle Initial)	
c. SIGNATURE	d. DATE SIGNED (YYYYMMDD)	c. DATE SIGNED (YYYYMMDD)	

DD FORM 2579 DEC 2000

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A



Programs & Services 3/1/2010

TOTAL ESTIMATED VALUE (Including Options)	
(2) SDB SET-ASIDE	
(3) HBC/MI SET-ASIDE	
(4) SR SET-ASIDE	

# ITEM DESCRIPTION (Including quantity)

6. ITEM DESCRIPTION (Including quantity)

YES NO (If all recommendations are "No," explain in remarks)  
 a. SECTION 8(a) (X one)  
 (1) COMPETITIVE (2) SOLE SOURCE  
 b. SMALL DISADVANTAGED BUSINESS (SDB) SET-ASIDE  
 c. HISTORICALLY BLACK COLLEGES AND UNIVERSITIES (HBCU/MI) SET-ASIDE  
 d. SMALL BUSINESS (SB) SET-ASIDE (List percentage)  
 e. EMERGING SMALL BUSINESS SET-ASIDE  
 f. EVALUATION PREFERENCE FOR SDBs  
 g. HUBZONE SET-ASIDE  
 h. HUBZONE SOLE SOURCE  
 i. HUBZONE PRICE EVALUATION PREFERENCE

11. SB PROGRESS PAYMENT SUBCONTRACTING REQUIRED (X one)  
 YES NO YES NO

14. REMARKS

15. REVIEWED BY SMALL BUSINESS ADMINISTRATIVE REPRESENTATIVE

a. NAME (Last, First, Middle Initial)  
 b. SIGNATURE c. DATE SIGNED (YYYYMMDD)

17. CONTRACTING OFFICER (X one)  
 CONCURS REJECTS

a. RECOMMENDATIONS (Document rejections on rejection form)

describes will require return for the re-evaluation by the SB specialist.

b. NAME (Last, First, Middle Initial)  
 c. SIGNATURE d. DATE SIGNED (YYYYMMDD)

## ITEM DESCRIPTION:

Description of purchase - including location – 5 “Ws” (Who, What, Where, When and Why):

☞ What is going on?

☞ State location where services are to be performed.

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Programs & Services

3/1/2010

7

# TYPE OF COORDINATION (X One)

## INITIAL CONTACT

MODIFICATION

WITHDRAWAL

SMALL BUSINESS COORDINATION RECORD		REPORT CONTROL SYMBOL
STATION NO./CONTRACT NO.		
PHONE (Include Area Code)		
NO. OF EMPLOYEES		\$c. DOLLARS
INDUSTRY (X one)		
ACQUISITION (X all that apply)		
(1) SECTION 8(a)		
(2) SDB SET-ASIDE		
(3) HBC/MI SET-ASIDE		
(4) SB SET-ASIDE		
(5) OTHER (Specify)		
(6) TWO OR MORE RESPONSIVE SB OFFERS ON PRIOR ACQUISITION		
(7) ONE OR MORE RESPONSIVE SDB OFFER(S) WITHIN 10% OF AWARD PRICE OF PRIOR ACQUISITION		
(8) WOMAN OWNED SB		
(9) SERVICE-DISABLED VETERAN SB		
11. SB PROGRESS PAYMENT SUBCONTRACTING PLAN REQUIRED (X one)		
YES <input type="checkbox"/> NO <input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/>		
14. REMARKS		
15. REVIEWED BY SMALL BUSINESS ADMINISTRATIVE REPRESENTATIVE		
a. NAME (Last, First, Middle Initial)		
b. SIGNATURE		c. DATE SIG (YYYYMM)
17. CONTRACTING OFFICER (X one)		
CONCURS <input type="checkbox"/> REJECTS <input type="checkbox"/>		
a. RECOMMENDATIONS (Document rejections on rev)		
b. NAME (Last, First, Middle Initial)		
c. SIGNATURE		d. DATE SIG (YYYYMM)
DD FORM 2579 DEC 2000		PREVIOUS

## TYPE OF COORDINATION (X one)

The appropriate type of coordination should be checked.

- Initial
- Modification
- Withdrawal



Programs & Services 3/1/2010

SMALL BUSINESS COORDINATION RECORD			REPORT CONTROL SYMBOL
1. CONTROL NO. (Optional)	2. PURCHASE REQUEST REQUISITION NO.	3. TOTAL ESTIMATED VALUE (Including options)	4. SOLICITATION NO./CONTRACT MODIFICATION NO.
5. BUYER			
a. NAME (Last, First, Middle Initial)		b. OFFICE SYMBOL	c. TELEPHONE (Include Area Code)
6. ITEM DESCRIPTION (Including quantity)			
7. TYPE OF COORDINATION (X One)		8. SMALL BUSINESS SIZE STANDARD	
<input type="checkbox"/> INITIAL CONTACT <input type="checkbox"/> MODIFICATION <input type="checkbox"/> WITHDRAWAL		a. NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS) CODE b. NO. OF EMPLOYEES c. DOLLARS	
9. RECOMMENDATION (X as applicable)		10. ACQUISITION HISTORY (X one)	
YES <input type="checkbox"/> NO <input type="checkbox"/> (If all recommendations are "No" exclude in second FIRST TIME BUY a. SECTION 8(c))		YES <input type="checkbox"/> NO <input type="checkbox"/> (If all recommendations are "No" exclude in second FIRST TIME BUY a. SECTION 8(c))	

## 8. SMALL BUSINESS SIZE STANDARD

a. NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS) CODE	b. NO. OF EMPLOYEES	c. DOLLARS
---	---------------------	------------

I. HUBZONE PRICE EVALUATION PREFERENCE		(9) SERVICE-DISABLED VETERAN SB	
11. SB PROGRESS PAYMENT CONTRACTING PLAN (X one)			
YES <input type="checkbox"/> NO <input type="checkbox"/>			
14. REMARKS			
15. REVIEWED BY SMALL BUSINESS REPRESENTATIVE			
a. NAME (Last, First, Middle Initial)			
b. SIGNATURE			
17. CONTRACTING OFFICER'S CONCURRENCE			
a. RECOMMENDATION			
b. NAME (Last, First, Middle Initial)		c. NAME (Last, First, Middle Initial)	
c. SIGNATURE	d. DATE SIGNED (YYYYMMDD)	e. SIGNATURE	f. DATE SIGNED (YYYYMMDD)

### SMALL BUSINESS SIZE STANDARD

- ☒ What is the NAICS code
- ☒ What standard goes with the code?
- ☒ [www.naics.com](http://www.naics.com)
- ☒ What is used for market research



Check what  
you **intend** do .

SMALL BUSINESS COORDINATION RECORD		REPORT CONTROL SYMBOL
1. CONTROL NO. (Optional)	2. PURCHASE REQUEST REQUISITION NO.	3. TOTAL ESTIMATED VALUE (Including options)
4. SOLICITATION NO./CONTRACT MODIFICATION NO.		
5. BUYER		
a. NAME (Last, First, Middle Initial)		
6. ITEM DESCRIPTION		
9. RECOMMENDATION (X as applicable)		
YES NO		
(If all recommendations are "No," explain in remarks)		
a. SECTION 8(a) (X one)		
(1) COMPETITIVE (2) SOLE SOURCE		
b. SMALL DISADVANTAGED BUSINESS (SDB) SET-ASIDE		
c. HISTORICALLY BLACK COLLEGES AND UNIVERSITIES/MINORITY INSTITUTIONS (HBCU/MI) SET-ASIDE (List percentage)		
d. SMALL BUSINESS (SB) SET-ASIDE (List percentage)		
e. EMERGING SMALL BUSINESS SET-ASIDE		
f. EVALUATION PREFERENCE FOR SDBs		
g. HUBZONE SET-ASIDE		
h. HUBZONE SOLE SOURCE		
i. HUBZONE PRICE EVALUATION PREFERENCE		
15. REVIEW REPRESENTATIVE		
a. NAME (Last, First, Middle Initial)		
b. SIGNATURE		
c. DATE SIGNED (YYYYMMDD)		
17. CONTRACTING OFFICER (X one)		
CONCURS REJECTS		
18. SMALL BUSINESS SPECIALIST (X one)		
CONCURS REJECTS APPEALS		
a. RECOMMENDATIONS (Document rejections or appeals)		
NOTE: Any change in the acquisition plan this coordination record describes will require return for the re-evaluation by the SB specialist.		
b. NAME (Last, First, Middle Initial)		
c. SIGNATURE		
d. DATE SIGNED (YYYYMMDD)		
e. SIGNATURE		
f. DATE SIGNED (YYYYMMDD)		
DD FORM 2579 DEC 2000		
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## RECOMMENDATION:

What is your strategy?

The rationale is explained in a remarks section on what has happened and what is planned.



SMALL BUSINESS COORDINATION RECORD			REPORT CONTROL SYMBOL
1. CONTROL NO. (Optional)	2. PURCHASE REQUEST NO./TOTAL ESTIMATED VALUE REQUISITION NO.	3. SOLICITATION NO./CONTRACT MODIFICATION NO.	
<b>5. BUYER</b>			
a. NAME (Last, First, Middle Initial)		b. OFFICE SYMBOL	c. TELEPHONE (Include Area Code)
6. ITEM DESCRIPTION (Including quantity)			
7. TYPE OF COORDINATION (X One)		8. SMALL BUSINESS SIZE STANDARD	
<input type="checkbox"/> INITIAL CONTACT <input type="checkbox"/> MODIFICATION <input type="checkbox"/> WITHDRAWAL <b>9. RECOMMENDATION (X as applicable)</b> YES NO (If all recommendations are "No," explain in a. SECTION 8(a) (X one)		a. NORTH SYST b. SMALL DISADVANTAGED BUSINESS (SDB) SET- c. HISTORICALLY BLACK COLLEGES AND/UNIVER MINORITY INSTITUTIONS (HBCU/MI) SET-ASIDE (List percentage) d. SMALL BUSINESS (SB) SET-ASIDE (List percentage) e. EMERGING SMALL BUSINESS SET-ASIDE f. EVALUATION PREFERENCE FOR SDBs g. HUBZONE SET-ASIDE h. HUBZONE SOLE SOURCE i. HUBZONE PRICE EVALUATION PREFERENCE	
11. SB PROGRESS PAYMENT SUBCOMMITMENT (X one) <input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> YES		10. ACQUISITION HISTORY (X one)	
14. REMARKS		a. FIRST TIME BUY b. PREVIOUS ACQUISITION (X all that apply) (1) SECTION 8(a) (2) SDB SET-ASIDE (3) HBCU/MI SET-ASIDE (4) SB SET-ASIDE (5) OTHER (Specify) (6) TWO OR MORE RESPONSIVE SB OFFERS ON PRIOR ACQUISITION (7) ONE OR MORE RESPONSIVE SDB OFFER(S) WITHIN 10% OF AWARD PRICE OF PRIOR ACQUISITION (8) WOMAN OWNED SB (9) SERVICE-DISABLED VETERAN SB	
15. REVIEWED BY SMALL BUSINESS REPRESENTATIVE			
a. NAME (Last, First, Middle Initial)			
b. SIGNATURE			
17. CONTRACTING OFFICER (X one)			
<input type="checkbox"/> CONCURS <input type="checkbox"/>			
a. RECOMMENDATIONS (Document)			
b. NAME (Last, First, Middle Initial)			
c. SIGNATURE			

DD FORM 2579 DEC  
2000



Programs & Services

3/1/2010

7

7

SMALL BUSINESS COORDINATION RECORD			REPORT CONTROL SYMBOL
1. CONTROL NO. (Option 2)	2. PURCHASE REQUEST REQUISITION NO.	3. TOTAL ESTIMATED VALUE (Including options)	4. SOLICITATION NO./CONTRACT MODIFICATION NO.
5. BUYER			
a. NAME (Last, First, Middle Initial)		b. OFFICE SYMBOL	c. TELEPHONE (Include Area Code)
6. ITEM DESCRIPTION (Including quantity)			

**REMARKS:** Justification and rationale. What and why. The real story with attachments as needed. Market research comments. Rule of two comments.

This may be a continuation of the item description above. A is basically a short comment on what you are doing and how you justify doing it.

#### 14. REMARKS

a. RECOMMENDATIONS (Document rejections of offers)		b. NAME (Last, First, Middle Initial)	
c. SIGNATURE		d. DATE SIGNED (YYYYMMDD)	e. DATE SIGNED (YYYYMMDD)
DD FORM 2579 DEC 2000		PREVIOUS EDITION IS OBSOLETE	

NOTE: Any change in the acquisition plan this coordination record describes will require return for the re-evaluation by the SB specialist.

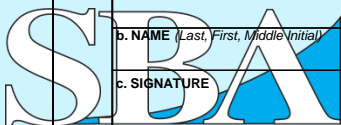


**Programs & Services**

3/1/2010

SMALL BUSINESS COORDINATION RECORD			REPORT CONTROL SYMBOL
1. CONTROL NO. (Optional)	2. PURCHASE REQUEST NO./ REQUISITION NO	3. TOTAL ESTIMATED VALUE (Including options)	4. SOLICITATION NO./CONTRACT MODIFICATION NO.
<b>5. BUYER</b>			
a. NAME (Last, First, Middle Initial)		b. OFFICE SYMBOL	c. TELEPHONE (Include Area Code)
6. ITEM DESCRIPTION (Including quantity)			
7. TYPE OF COORDINATION (X One)		8. SMALL BUSINESS SIZE STANDARD	
<input type="checkbox"/> INITIAL CONTACT <input type="checkbox"/> MODIFICATION <input type="checkbox"/> WITHDRAWAL		a. NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS) CODE b. NO. OF EMPLOYEES c. DOLLARS	
9. RECOMMENDATION (X as applicable)		10. ACQUISITION PLAN	
YES <input type="checkbox"/> NO <input type="checkbox"/> (If all recommendations are "No," explain in remarks)		a. FIF <input type="checkbox"/> b. PR <input type="checkbox"/>	
a. SECTION 8(a) (X one)			
<input type="checkbox"/> (1) COMPETITIVE <input type="checkbox"/> (2) SOLE SOURCE			
b. SMALL DISADVANTAGED BUSINESS (SDB) SET-ASIDE			
c. HISTORICALLY BLACK COLLEGES AND UNIVERSITIES/ MINORITY INSTITUTIONS (HBCU/MI) SET-ASIDE (List percentage) %			
d. SMALL BUSINESS (SB) SET-ASIDE (List percentage) %			
e. EMERGING SMALL BUSINESS SET-ASIDE			
f. EVALUATION PREFERENCE FOR SDBs			
g. HUBZONE SET-ASIDE			
h. HUBZONE SOLE SOURCE			
i. HUBZONE PRICE EVALUATION PREFERENCE			
11. SB PROGRESS PAYMENTS (X one)		12. SUBCONTRACTING PLAN REQUIRED (X one)	
YES <input type="checkbox"/> NO <input type="checkbox"/>		YES <input type="checkbox"/> NO <input type="checkbox"/>	
13. SYNOPSIS		YES <input type="checkbox"/>	
14. REMARKS			
15. REVIEWED BY SMALL BUSINESS ADMINISTRATION (SBA) REPRESENTATIVE		16. LOCAL USE	
a. NAME (Last, First, Middle Initial)			
b. SIGNATURE		c. DATE SIGNED (YYYYMMDD)	
17. CONTRACTING OFFICER (X one)		18. SMALL BUSINESS SPECIALIST (X one)	
<input type="checkbox"/> CONCURS <input type="checkbox"/> REJECTS		<input type="checkbox"/> CONCURS <input type="checkbox"/> APPEALS	
a. RECOMMENDATIONS (Document rejections on reverse side)		NOTE: Any change in the acquisition plan this coordination record describes will require return for the re-evaluation by the SB specialist.	
b. NAME (Last, First, Middle Initial)		a. NAME (Last, First, Middle Initial)	
c. SIGNATURE		c. DATE SIGNED (YYYYMMDD)	

Is a subcontracting plan required?



Programs & Services

SMALL BUSINESS COORDINATION RECORD			REPORT CONTROL SYMBOL
1. CONTROL NO. (Optional)	2. PURCHASE REQUEST REQUISITION NO.	3. TOTAL ESTIMATED VALUE (Including options)	4. SOLICITATION NO./CONTRACT MODIFICATION NO.
5. BUYER			
a. NAME (Last, First, Middle Initial)		b. OFFICE SYMBOL	c. TELEPHONE (Include Area Code)
6. ITEM DESCRIPTION (Including quantity)			

**REMARKS:** For DoD, comment on compliance with DFARS 215.304 that includes small business participation as an evolution factor in source selection. Same considerations with civilian agencies.

11. SB PROGRESS PAYMENT (X one)	12. SUBCONTRACTING PLAN REQUIRED (X one)	13. SYNOPSIS REQUIRED (X one) (If "No," cite FAR 5.202 exception)
<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO

(PGI 215.304(c)(i)(A) has examples, including past performance in subcontracting and extent of small business subcontracting dollars in terms of total value of acquisition.

b. NAME (Last, First, Middle Initial)		a. NAME (Last, First, Middle Initial)	
c. SIGNATURE	d. DATE SIGNED SIGNATURE (YYYYMMDD)	c. DATE SIGNED (YYYYMMDD)	
DD FORM 2579 DEC 2000		PREVIOUS EDITION IS OBSOLETE	
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**Programs & Services**

SMALL BUSINESS COORDINATION RECORD			REPORT CONTROL SYMBOL
1. CONTROL NO. (Options)	2. PURCHASE REQUEST NO. REQUISITION NO.	3. TOTAL ESTIMATED VALUE (Including options)	4. SOLICITATION NO./CONTRACT MODIFICATION NO.
<b>5. BUYER</b>			
a. NAME (Last, First, Middle Initial)		b. OFFICE SYMBOL	c. TELEPHONE (Include Area Code)
6. ITEM DESCRIPTION (Including quantity)			
7. TYPE OF COORDINATION (X One)		8. SMALL BUSINESS SIZE STANDARD	
<input type="checkbox"/> INITIAL CONTACT <input type="checkbox"/> MODIFICATION <input type="checkbox"/> WITHDRAWAL		a. NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS) CODE b. NUMBER OF EMPLOYEES c. DOLLARS	
9. RECOMMENDATION (X as applicable)		10. ACQUISITION HISTORY (X one)	
YES <input type="checkbox"/> NO <input type="checkbox"/> (If all recommendations are "No," explain in remarks.) a. SECTION 8(a) (X one) (1) COMPETITIVE (2) SOLE SOURCE b. SMALL DISADVANTAGED BUSINESS (SDB) SET-ASIDE c. HISTORICALLY BLACK COLLEGES AND UNIVERSITIES / MINORITY INSTITUTIONS (HBCU/MI) SET-ASIDE (List percentages) d. SMALL BUSINESS (SB) SET-ASIDE (List percentage) e. EMERGING SMALL BUSINESS SET-ASIDE f. EVALUATION PREFERENCE FOR SDBs g. HUBZONE SET-ASIDE h. HUBZONE SOLE SOURCE i. HUBZONE PRICE EVALUATION PREFERENCE		FIRST TIME BUY b. PREVIOUS ACQUISITION (X all that apply) (1) SECTION 8(a) (2) SDB SET-ASIDE (3) HBCU/MI SET-ASIDE (4) SB SET-ASIDE (5) OTHER (Specify) (6) TWO OR MORE RESPONSIVE SB OFFERS ON PRIOR ACQUISITION (7) ONE OR MORE RESPONSIVE SDB OFFER(S) WITHIN 10% OF AWARD PRICE OF PRIOR ACQUISITION (8) WOMAN OWNED SB (9) SERVICE-DISABLED VETERAN SB	
11. SB PROGRESS PAYMENTS REQUIRED (X one)		13. SYNOPSIS REQUIRED (X one) (If "No," cite FAR 5.202 exception)	
YES <input type="checkbox"/> NO <input type="checkbox"/>		YES <input type="checkbox"/> NO <input type="checkbox"/>	
14. REMARKS			
a. RECOMMENDATIONS (Document rejections on DD FORM 2579 DEC 2000) b. NAME (Last, First, Middle Initial) c. SIGNATURE d. DATE SIGNED (YYYYMMDD)			
NOTE: Any change in the acquisition plan this coordination record describes will require return for the re-evaluation by the SB specialist. a. NAME (Last, First, Middle Initial) c. DATE SIGNED (YYYYMMDD)			

**SIGNATURES and contact information:**

**SBA comes last**



**Programs & Services**

**3/1/2010**

**8**

**1**

## 5. Whom to contact at SBA for what



# **SBA quick reference: Whom to contact for what**

1. SBA government contracting area offices
2. SBA district offices
3. SBA headquarters
4. SBA procurement center representatives

## **SBA Mission**

Maintain and strengthen the nation's economy by aiding, counseling, assisting and protecting the interests of small businesses and by helping families and businesses recover from national disasters.

### **1. Financing and bonding**

**<http://www.sba.gov/financing/index.html>**

### **2. Counseling and technical assistance**

**<http://www.sba.gov/aboutsba/sbaprograms/ed/index.html>**

### **3. Fair access to Federal contracts and subcontracts**

# Quick reference: Referrals to SBA area offices\*

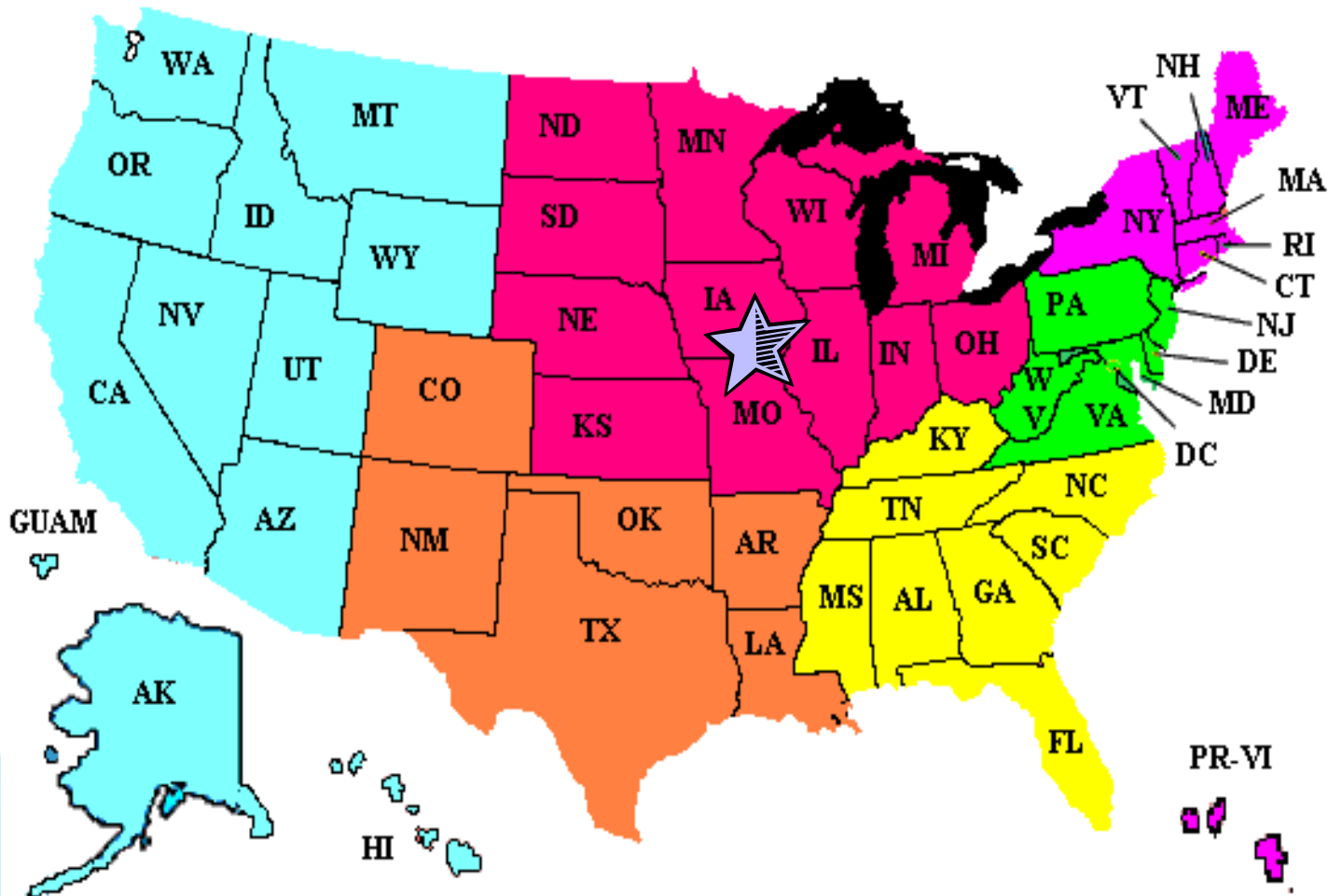
- |   |  |
|---|--|
| 1. Size protests (with recertification)   | FAR 19.302<br>13 CFR 121.1001<br>13 CFR 121.1010       |
| 2. Certificate of competency  | FAR 19.6<br>13 CFR 125.5                               |
| 3. COC Limitations on subcontracting compliance   | FAR 19.601<br>13 CFR 125.6(f)                          |
| 4. Closest PCR (procurement center representative)  | FAR 19.402<br>13 CFR 125.2(b)(3)<br>13 CFR 125.2(b)(3) |
| 5. Locating closest CMR*** (commercial market representative) for subcontracting and ESRS matters | 13 CFR 125.3   |

\* To locate SBA area offices and closest SBA PCR see:

<http://www.sba.gov/aboutsba/sbaprograms/gc/contacts/index.html>

\*\*\* CMRs: [http://www.sba.gov/aboutsba/sbaprograms/gc/contacts/gc\\_cmr.html](http://www.sba.gov/aboutsba/sbaprograms/gc/contacts/gc_cmr.html)

# SBA Government Contracting Areas



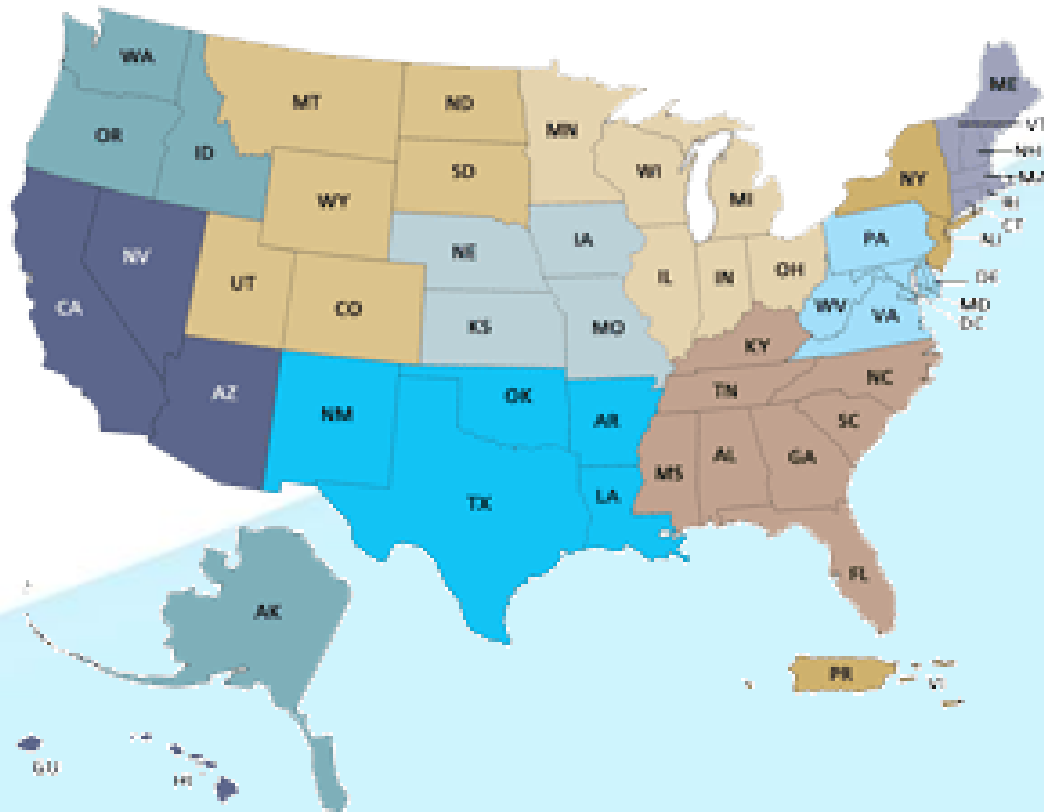
[http://www.sba.gov/aboutsba/sbaprograms/gcbd/GC\\_PCRD1.html](http://www.sba.gov/aboutsba/sbaprograms/gcbd/GC_PCRD1.html)

# Quick reference: Referrals to SBA district offices\*\*

- |  |                                |
|--|--------------------------------|
| 1. 8(a) project offering to servicing SBA office | FAR 19.804-2<br>13 CFR 124.502 |
| 2. 8(a) project appeals                          | FAR 19.810<br>13 CFR 124.505   |

\*\* To locate SBA servicing office, check Dynamic Small Business Search at [www.ccc.gov](http://www.ccc.gov) and then local resources at <http://www.sba.gov/localresources/index.html>

# SBA District Offices



<http://www.sba.gov/localresources/index.html>

# Quick reference: Referrals to SBA headquarters

1. HUBZone status protests FAR 19.306  
13 CFR 126.801
2. NAICS code appeal FAR 19.30 3  
13 CFR 121.1103
3. Nonmanufacturer rule waivers  
FAR 19.102(f)(1)-(7)  
13 CFR 121.1204
4. SDVOSB status protest FAR 19.307  
13 CFR 125.23

## Quick reference: Referrals to SBA PCRs\*

1. SBA PCR coordination records
  - FAR 19.501(b)
  - 13 CFR 125.2
2. Small business set-aside appeals
  - FAR 19.505
  - 13 CFR 125.2(b)(7)
3. HUBZone set-aside appeals
  - FAR 19.1305
  - FAR 19.1306
  - 13 CFR 126.61
4. SDVOSB set-aside appeal
  - FAR 19.1405
  - FAR 19.1406
  - 13 CFR 125.22
5. Reporting bundling to SBA (MATOCs)
  - FAR 19.202-1(e)(1)
  - 13 CFR 125.2

\* To locate SBA area offices and closest SBA PCR see:

<http://www.sba.gov/aboutsba/sbaprograms/gc/contacts/index.html>

## Quick reference: Referrals to SBA PCR<sup>s</sup>\*

### 6. SBA subcontracting plan reviews-copies

FAR 19.705-5(3)

13 CFR 125.2(b)(6)(iii)

FAR 19.705-6(c)

13 CFR 125.2(b)(6)(iii)(C)

### 7. SBA subcontracting program review

FAR 19.707(4)

13 CFR 125.2(b)(6)(iii)(C)

### 8. Small business TFD FAR 49.402-3 (e)(4))

(Termination for default)

\* To locate SBA area offices and closest SBA PCR see:

<http://www.sba.gov/aboutsba/sbaprograms/gc/contacts/index.html>

Monday, March 01, 2010

**3/1/2010**

# **“Small business marketing research and coordinating with SBA”**



Try a little gusto



# SBA First Wednesday Seminar starts at 9:30 Central

Test drive of Ready Talk:

- ◆ Call-in is 1-866-740-1260, access code 3076601.
- ◆ Log-in at [www.readytalk.com](http://www.readytalk.com), same code.
- ◆ Support: 800-843-9166. Have access code.
- ◆ Introduce yourselves prior to 9:30 if you want
- ◆ Do not minimize the screen. You will be shut out of system.
- ◆ Put your phone on mute. Unless your office is quiet.
- ◆ We email copies of the PowerPoint upon request.
- ◆ If listening in groups, email participant names and email addresses in Excel for 1102 credit – within a week of training.



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***“An investment in **knowledge** pays the best interest.”***

